

UK TOURISM SURVEY - January 2010 SUMMARY OF RESULTS

1. Headlines

- In the month of January, there were 5.6 million domestic tourism trips in the UK down from 5.8 million in 2009 – a 3% decrease.
- The number of bednights and total expenditure both declined by 13% during the month.
- Reflecting the UK trend, within England, trips fell by 3% from 4.7 million to 4.6 million.
- In England, total nights fell by -16% while spend also decreased by -6%.
- Nevertheless, considering the whole of the past 12 months, trip levels remain well up on the same period in 2008-9, with 7% more trips and a 4% increase in expenditure.

2. Trip Characteristics

- **Note: Base sizes are low in the month of January, and results should be viewed as indicative only.**
- During the first month of the year, there were slight decreases across all trip types; “pure holiday” trips fell by 8%, business trips were down 3% and visits to friends and family by 1%.
- There was a decline in length of trip driven by a decline in “pure holiday” nights (-25%) and business nights (-23%).
- The weather was exceptional during the month; snowfall was widespread and England experienced its coldest January since 1987. This may have restricted travel and impacted trip length.
- The fall in business nights was the main reason for the overall reduction in expenditure.

3. Overseas Travel by UK Residents

- In January 2010, UK residents made 13% fewer trips abroad than in January 2009, while spend was down by 11%.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 28% for the month of January (1% higher than in January '09).

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
January '10									
UK	5.8	5.6	-3%	14.2	12.5	-13%	878	760	-13%
England	4.7	4.6	-3%	11.5	9.6	-16%	649	611	-6%

Purpose of Trip – January 2009

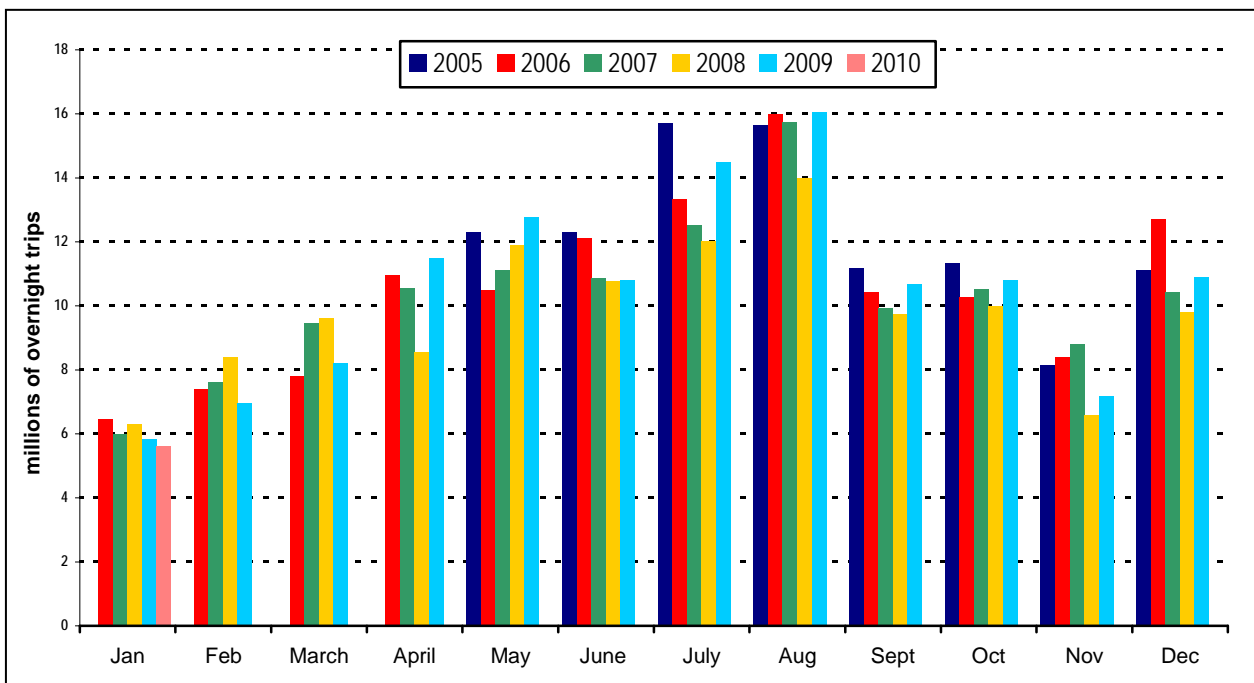
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	1.8	1.7	-8%	4.9	3.7	-25%	321	317	-1%
Business	1.2	1.1	-3%	2.8	2.2	-23%	317	211	-33%
VFR	2.7	2.6	-1%	6.0	6.3	6%	216	204	-6%
England									
Holiday	1.4	1.3	-7%	3.7	2.6	-29%	237	250	5%
Business	0.9	0.9	-4%	2.3	1.7	-23%	214	176	-18%
VFR	2.3	2.2	-1%	5.0	5.0	-1%	177	159	-10%

Outbound Travel – UK Residents

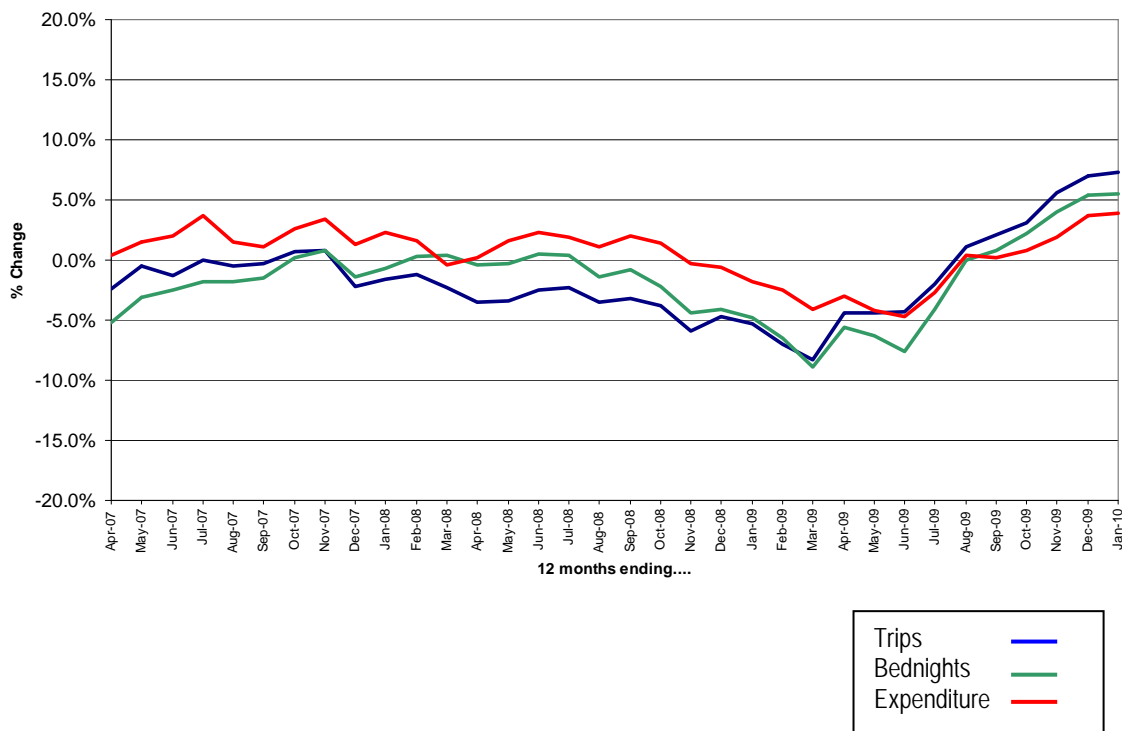
	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
January 2010	3.9	3.4	-13%	2.3	2.0	-11%
Feb – Jan '10	68.2	58.0	-15%	36.4	31.5	-14%

TREND CHARTS

UK All Trips – Domestic Trip Volume by Month



UK All Trips - Annual Percentage Change



Year on Year Comparison, by Trip Characteristic

Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (January 2009 vs January 2010)
- Year to date (February 2008– January 2009 vs February 2009– January 2010)

Percentage changes are colour coded:

Green indicates a change of over 5 percentage points **better** than the average across all trips (so a drop of -4% would be shaded green if all trips had declined by 10% over the same period)

Yellow indicates a change of within +/- 5 percentage points of the average

Orange indicates a change of more than 5 percentage points **worse** than the average

This analysis does **not necessarily indicate differences that are statistically significant**. For many of the categories included, particularly when reviewing single month data, changes would need to be much larger than the +/-5% cut-off point used to be statistically significant, and should always be reviewed in the context of the longer term trends. Even so, we feel that this analysis is helpful in understanding some of the market dynamics behind the overall monthly figures.

Sample sizes (underlying numbers of trips) are indicated on the spreadsheet – those with a very low base (fewer than 75 trips) have been “greyed out” to highlight that results should be treated with caution.

YEAR-ON-YEAR COMPARISON, BY TRIP CHARACTERISTIC

UKTS: Comparisons with equivalent periods, 2009

Comparisons with equivalent periods, 2009

LEGEND: Above Average Performance, Average Performance, Below Average Performance

NOTE: In the tables below, 'average performance' refers to the total trips/nightst/expenditure to either UK or England in each time period. Those cells marked 'above average performance' indicate where the percentage change is more than 5 percentage points above the average; those marked 'below average performance' indicate where the percentage change is more than 5 percentage points below the average. These changes are not necessarily statistically significant - they only indicate those cells where changes are further away from the average. The numbers of unweighted trips are also displayed to indicate where sample sizes are relatively small. Where there are 75 or fewer unweighted trips, the % change figures have been greyed out to indicate that they should be treated with caution.

	United Kingdom											
	Month: January 2010			Unweighted Trips	YTD: January - January 2010			Unweighted Trips	2 month rolling February 2009 - January 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-3.5%	-12.6%	-13.4%	830	-3.5%	-12.6%	-13.4%	830	7.3%	5.4%	3.9%	18600
PURPOSE:												
Pure Holiday	-7.6%	-25.2%	-1.2%	248	-7.6%	-25.2%	-1.2%	248	16.0%	14.1%	11.1%	9280
- 1-3 nights holiday	-2.2%	-6.1%	5.8%	213	-2.2%	-6.1%	5.8%	213	17.2%	16.2%	6.7%	5544
- 4+ nights holiday	-30.6%	-47.8%	-22.2%	36	-30.6%	-47.8%	-22.2%	36	14.2%	13.1%	15.6%	3736
VFR (on holiday)	5.9%	4.7%	-8.5%	215	5.9%	4.7%	-8.5%	215	1.2%	4.5%	-4.9%	3660
HOLIDAY (TOTAL)	-2.1%	-13.5%	-3.2%	463	-2.1%	-13.5%	-3.2%	463	11.4%	11.5%	8.0%	12940
VFR (non-holiday)	-6.7%	7.1%	-2.0%	195	-6.7%	7.1%	-2.0%	195	1.3%	-6.9%	-4.4%	3064
VFR (TOTAL)	-0.7%	5.8%	-5.6%	409	-0.7%	5.8%	-5.6%	409	1.2%	-0.3%	-4.7%	6724
Business	-3.1%	-23.0%	-33.4%	144	-3.1%	-23.0%	-33.4%	144	0.3%	-1.5%	-3.8%	2173
RDA:												
Adv West Midlands	-38.5%	-33.8%	-30.4%	50	-38.5%	-33.8%	-30.4%	50	6.6%	-3.8%	3.8%	1157
East of England	0.2%	-35.2%	-7.8%	64	0.2%	-35.2%	-7.8%	64	15.1%	4.0%	3.2%	1592
East Midlands	3.6%	8.9%	18.2%	51	3.6%	8.9%	18.2%	51	8.3%	-0.7%	2.4%	1153
London	43.7%	64.0%	31.1%	127	43.7%	64.0%	31.1%	127	10.9%	-5.4%	1.3%	1539
North West	-23.7%	-27.5%	0.0%	67	-23.7%	-27.5%	0.0%	67	3.9%	2.3%	3.0%	1959
ONE North East	-16.4%	-37.1%	3.7%	33	-16.4%	-37.1%	3.7%	33	-7.7%	-8.2%	-15.0%	542
South East England	29.2%	4.4%	-3.2%	135	29.2%	4.4%	-3.2%	135	15.3%	12.7%	11.5%	2787
South West	-15.3%	-49.5%	-42.9%	85	-15.3%	-49.5%	-42.9%	85	10.8%	12.3%	13.3%	3162
Yorkshire Forward	-21.6%	-1.3%	-19.4%	79	-21.6%	-1.3%	-19.4%	79	8.9%	14.7%	11.3%	1580
LOCATION TYPE:												
Seaside	-10.0%	-26.8%	-26.1%	81	-10.0%	-26.8%	-26.1%	81	17.4%	18.5%	14.6%	4305
Large city/ large town	-2.4%	-10.5%	-15.2%	396	-2.4%	-10.5%	-15.2%	396	6.4%	-2.7%	-3.4%	6915
Small town	20.0%	1.6%	-13.5%	222	20.0%	1.6%	-13.5%	222	2.0%	-1.0%	2.1%	4272
Countryside/ village	-24.7%	-23.1%	2.3%	137	-24.7%	-23.1%	2.3%	137	7.1%	10.1%	10.9%	3611
AGE:												
16-24	9.9%	22.5%	-4.7%	121	9.9%	22.5%	-4.7%	121	-3.1%	-12.3%	-10.9%	2022
25-34	-7.0%	4.6%	-38.0%	140	-7.0%	4.6%	-38.0%	140	12.5%	-24.8%	7.2%	2983
35-44	1.8%	-17.0%	0.0%	175	1.8%	-17.0%	0.0%	175	10.5%	10.3%	4.3%	4127
45-54	-11.6%	-31.1%	-27.0%	143	-11.6%	-31.1%	-27.0%	143	8.2%	11.0%	4.6%	3215
55+	-6.9%	-16.0%	3.0%	251	-6.9%	-16.0%	3.0%	251	6.0%	3.5%	6.9%	6282
SEG:												
AB	-21.6%	-32.9%	-32.5%	253	-21.6%	-32.9%	-32.5%	253	4.0%	2.1%	-2.2%	5950
C1	8.7%	4.3%	-3.4%	286	8.7%	4.3%	-3.4%	286	8.9%	10.4%	11.9%	5824
C2	24.3%	10.3%	76.6%	146	24.3%	10.3%	76.6%	146	7.4%	-0.5%	1.6%	3252
DE	-0.4%	-8.6%	-33.7%	144	-0.4%	-8.6%	-33.7%	144	12.0%	9.3%	6.8%	3574
CHILDREN IN H/H:												
Any	19.0%	2.8%	-4.2%	287	19.0%	2.8%	-4.2%	287	10.8%	12.1%	3.3%	6521
None	-10.5%	-17.0%	-16.0%	543	-10.5%	-17.0%	-16.0%	543	5.7%	2.4%	4.1%	12079
ACCOMMODATION:												
Commercial accom	-3.1%	-19.2%	-14.4%	398	-3.1%	-19.2%	-14.4%	398	10.6%	8.6%	5.7%	10572
- Serviced accom	2.6%	-3.8%	-8.0%	351	2.6%	-3.8%	-8.0%	351	7.1%	3.9%	1.2%	6888
- Hotel/motel/guesthouse	-1.0%	-8.0%	-11.0%	321	-1.0%	-8.0%	-11.0%	321	7.0%	3.3%	0.1%	6063
- Bed & Breakfast	61.1%	53.6%	56.5%	30	61.1%	53.6%	56.5%	30	5.6%	7.4%	10.8%	859
Total self-catering rented	-33.0%	-62.4%	-59.1%	35	-33.0%	-62.4%	-59.1%	35	23.6%	19.9%	18.3%	3371
-Camping & Caravanning (inc. owned caravans)	-29.8%	-62.7%	-68.2%	11	-29.8%	-62.7%	-68.2%	11	20.0%	15.0%	13.6%	2673
-Other self-catering rented	-32.1%	-61.0%	-55.7%	28	-32.1%	-61.0%	-55.7%	28	22.1%	19.9%	19.3%	1293
Hostels	13.9%	95.5%	100.0%	12	13.9%	95.5%	100.0%	12	-12.0%	-19.5%	-1.1%	224
Own home/friends'/relatives'	-5.5%	-9.0%	-11.3%	409	-5.5%	-9.0%	-11.3%	409	3.6%	1.0%	-1.7%	7806

	England											
	Month: January 2010			Unweighted Trips	YTD: January - January 2010			Unweighted Trips	2 month rolling February 2009 - January 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-3.2%	-16.1%	-5.9%	679	-3.2%	-16.1%	-5.9%	679	8.2%	5.9%	6.3%	15198
PURPOSE:												
Pure Holiday	-6.7%	-29.4%	5.5%	191	-6.7%	-29.4%	5.5%	191	17.7%	17.7%	13.4%	7237
- 1-3 nights holiday	1.6%	3.9%	19.1%	167	1.6%	3.9%	19.1%	167	18.3%	18.3%	6.7%	4370
- 4+ nights holiday	-40.9%	-62.6%	-31.3%	25	-40.9%	-62.6%	-31.3%	25	16.7%	17.5%	21.2%	2861
VFR (on holiday)	1.8%	-4.6%	-13.5%	175	1.8%	-4.6%	-13.5%	175	3.4%	4.6%	-0.2%	3096
HOLIDAY (TOTAL)	-3.0%	-19.3%	-0.6%	366	-3.0%	-19.3%	-0.6%	366	13.0%	13.9%	10.8%	10332
VFR (non-holiday)	-3.9%	2.0%	-4.9%	171	-3.9%	2.0%	-4.9%	171	1.9%	-7.7%	-6.3%	2683
VFR (TOTAL)	-1.2%	-1.4%	-10.2%	346	-1.2%	-1.4%	-10.2%	346	2.7%	-0.8%	-2.9%	5781
Business	-3.5%	-23.1%	-17.8%	116	-3.5%	-23.1%	-17.8%	116	1.4%	-3.2%	0.4%	1819
RDA:												
Adv West Midlands	-38.5%	-33.8%	-30.4%	50	-38.5%	-33.8%	-30.4%	50	6.6%	-3.8%	3.8%	1157
East of England	0.2%	-35.2%	-7.8%	64	0.2%	-35.2%	-7.8%	64	15.1%	4.0%	3.2%	1592
East Midlands	3.6%	8.9%	18.2%	51	3.6%	8.9%	18.2%	51	8.3%	-0.7%	2.4%	1153
London	43.7%	64.0%	31.1%	127	43.7%	64.0%	31.1%	127	10.9%	-5.4%	1.3%	1539
North West	-23.7%	-27.5%	0.0%	67	-23.7%	-27.5%	0.0%	67	3.9%	2.3%	3.0%	1959
ONE North East	-16.4%	-37.1%	3.7%	33	-16.4%	-37.1%	3.7%	33	-7.7%	-8.2%	-15.0%	542
South East England	29.2%	4.4%	-3.2%	135	29.2%	4.4%	-3.2%	135	15.3%	12.7%	11.5%	2787
South West	-15.3%	-49.5%	-42.9%	85	-15.3%	-49.5%	-42.9%	85	10.8%	12.3%	13.3%	3162
Yorkshire Forward	-21.6%	-1.3%	-19.4%	79	-21.6%	-1.3%	-19.4%	79	8.9%	14.7%	11.3%	1580
LOCATION TYPE:												
Seaside	-3.1%	-27.4%	-22.2%	68	-3.1%	-27.4%	-22.2%	68	19.8%	21.1%	16.1%	3416
Large city/ large town	0.3%	-7.7%	2.8%	341	0.3%	-7.7%	2.8%	341	7.0%	-2.6%	-0.1%	5867
Small town	19.8%	-5.2%	-11.3%	178	19.8%	-5.2%	-11.3%	178	3.8%	0.7%	6.0%	3451
Countryside/ village	-34.6%	-38.7%	-16.5%	95	-34.6%	-38.7%	-16.5%	95	7.1%	8.1%	10.6%	2854
AGE:												
16-24	2.6%	15.3%	-17.1%	97	2.6%	15.3%	-17.1%	97	-6.7%	-16.1%	-13.3%	1653
25-34	0.1%	-1.5%	-20.0%	117	0.1%	-1.5%	-20.0%	117	17.1%	17.6%	11.3%	2469
35-44	-5.7%	-29.9%	-9.4%	135	-5.7%	-29.9%	-9.4%	135	11.4%	10.1%	8.9%	3333
45-54	1.3%	-22.0%	0.7%	120	1.3%	-22.0%	0.7%	120	8.9%	9.1%	7.3%	2573
55+	-8.9%	-21.8%	4.2%	211	-8.9%	-21.8%	4.2%	211	7.5%	5.7%	8.7%	5184
SEG:												
AB	-20.3%	-35.0%	-22.5%	211	-20.3%	-35.0%	-22.5%	211	4.8%	0.7%	1.3%	4914
C1	5.7%	-5.1%	2.3%	237	5.7%	-5.1%	2.3%	237	6.8%	9.7%	10.9%	4739
C2	21.1%	-1.0%	78.3%	110	21.1%	-1.0%	78.3%	110	11.6%	3.8%	6.4%	2661
DE	9.3%	2.4%	-31.5%	121	9.3%	2.4%	-31.5%	121	16.4%	12.1%	10.5%	2870
CHILDREN IN H/H:												
Any	28.3%	2.8%	6.4%	239	28.3%	2.8%	6.4%	239	13.0%	13.0%	8.9%	5317
None	-12.4%	-21.6%	-9.2%	441	-12.4%	-21.6%	-9.2%	441	6.1%	2.9%	5.3%	9880
ACCOMMODATION:												
Commercial accom	0.2%	-18.1%	-0.2%	327	0.2%	-18.1%	-0.2%	327	12.7%	11.2%	8.6%	8541
- Serviced accom	6.2%	1.2%	10.3%	292	6.2%	1.2%	10.3%	292	8.8%	6.5%	3.9%	5653
- Hotel/motel/guesthouse	0.7%	-4.6%	6.3%	263	0.7%	-4.6%	6.3%	263	9.2%	6.1%	3.2%	5011
- Bed & Breakfast	99.0%	72.7%	78.9%	28	99.0%	72.7%	78.9%	28	3.6%	8.9%	9.7%	686
Total self-catering rented	-46.2%	-76.4%	-71.2%	22	-46.2%	-76.4%	-71.2%	22	28.0%	25.3%	22.8%	2636
-Camping & Caravanning (inc. owned caravans)	-51.7%	-64.5%	-84.2%	6	-51.7%	-64.5%	-84.2%	6	26.7%	23.8%	3.8%	2036
-Other self-catering rented	-44.4%	-79.2%	-66.7%	17	-44.4%	-79.2%	-66.7%	17	22.2%	22.3%	22.2%	992
Hostels	116.7%	280.3%	400.0%	12	116.7%	280.3%	400.0%	12	-19.7%	-26.6%	-1.5%	155
Own home/friends'/relatives'	-6.5											